

How to Construct an Individual Development Plan (IDP)

Lesson Plan

Time Required: 2 Hours

Workshop Objectives:

This workshop will prepare participants to:

1. Identify the components of an effective IDP;
2. Describe the IDP development process;
3. Explain the role of the employee, the supervisor, the career counselor, and the training officer in the IDP process;
4. Identify developmental goals, training solutions, and developmental assignments that may be part of the IDP process; and
5. Begin a draft of their IDPs.

Resources Needed:

Materials:

Manual, including the following handouts:

Preparing an IDP

Role of the Employee, Supervisor, and the Career Assistance Counselor

Important Points to Remember When Preparing an IDP

Questions Employees Can Consider When Beginning to Draft an IDP

Commonly Asked Questions About IDPs

Steps in the IDP Process

Types of Training and Developmental Activities

IDP Sample

Case Studies

Case Study Worksheet

Organizational role paper or mission statement

IDP examples on transparencies

Blank IDP forms

Equipment:

Overhead projector

Overhead transparencies

Flip chart

Markers

Name tents

I. Welcome and Introductions

A. Presenter(s)

Introduce yourself, giving details about your current position and any past experience that relates to this workshop. Welcome the participants to the workshop.

B. Participants

Ask participants to introduce themselves, stating their name, what they do, and their expectations for the workshop. Record expectations on flip chart.

II. Workshop Objectives

A. Display objectives on flip chart or overhead.

Review workshop objectives and address how they relate to the expectations expressed by the participants.

III. Overview of the IDP

A. Ask the participants what they think of when they hear the term “Individual Development Plan”

*Relate their answers to the bullet points on page 1 of the manual providing information regarding what an IDP **is** and **is not**. Highlight these points:*

- IDP is a joint effort between the employee and his/her manager.
- IDPs are useful tools to reach the goals of both the employees AND the organization.
- Participants have probably already developed something similar to an IDP -- it may have been called an “Employment Development Plan”.

B. Discuss relevance of an IDP in today’s work world, stressing these points:

- Employees need to take charge of their own careers and make sure their performance is acceptable.
- To stay marketable in the long-term, you must maintain skills that will be in demand with organizational goals.

C. Discuss the goals of the IDP by reviewing page 2 of the manual, stressing that:

- An IDP can focus on both current position AND on future goals. The **first** priority is to perform successfully on your current job.

D. Generate discussion on:

- How individual goals can support organizational goals (*use organizational mission statement, strategic planning documents, etc. if available*).

IV. IDP Elements

- A. Discuss the elements of an IDP on page 2 of the manual and relate them to the goals.
- B. Discuss the roles of the Employee, the Supervisor, and the Career Assistance Counselor in developing an IDP by reviewing page 3 of the manual.
- C. Discuss important points to remember when preparing an IDP.
 - *Review page 4 of the manual.*
- D. Discuss questions that the employee can consider when beginning to draft the IDP.
 - *Review page 5 of manual. Supplement with “real-life” examples, if any.*
- E. Discuss commonly asked questions about IDPs.
 - *Review page 6 of manual.*

V. Steps in the IDP Process

- A. Briefly discuss the five steps in the IDP process.
 - *Review pages 7 and 8 of the manual.*

VI. Types of Training and Developmental Activities

- A. Discuss sources of formal and informal training.
 - *Review pages 9 and 10 of the manual.*
 - *Give examples of how actual employees have used these services in the past.*
 - *Show training catalogs that can be used as resources.*

VII. Review of the Sample IDPs

- A. Display overheads.
 - *Review samples in detail.*
 - *Stress variety of activities included.*
 - *Stress importance of on-the-job activities to supplement/reinforce any formal training that takes place.*
- B. As a review, ask participants how developmental goals can be identified.
 - From position description.
 - Discussions with manager on organizational/office goals.
 - Discussions with manager on strengths and developmental needs.
 - A self-assessment

VIII. Case Study Exercise

A. Give instructions for exercise:

1. Handout **Case Studies** and **Case Study Worksheet**
2. Participants break into three groups and choose a spokesperson.
3. Each group discusses **one** case study.
4. For their assigned case, each group should use the **Case Studies Worksheet**: to:
 - define several of the employee's developmental goals
 - describe how these developmental goals meet the agency needs
 - list a variety of training solutions and developmental assignments that are appropriate to the case
5. Report-out.

Presenter: Possible solutions to case studies include:

<u>Case 1</u>	
Developmental Goals:	To be more assertive in communication; to practice communicating with others so it feels more comfortable.
Meets Agency's Needs:	Presenter: tailor this section to your agency's mission, goals, etc.
Training/ Developmental Assignments:	Take class on assertiveness; take class on communication skills; obtain work assignment to participate in meetings; obtain work assignment to gather information from other employees on a particular topic.

<u>Case 2</u>	
Developmental Goals:	Improve oral communication skills; improve understanding of team member responsibilities; obtain experience and skills in office automation.
Meets Agency's Needs:	Presenter: tailor this section to your agency's mission, goals, etc.
Training/ Developmental Assignments:	Take classes in oral communication; review videos on team building; join a task force or professional organization; take classes in office automation; get work assignments involving office automation projects.

<u>Case 3</u>	
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Developmental Goals:	Even though there are no jobs available now, prepare for possible positions in your office when they do open up; learn new skills; obtain training or experience in accounting to see if you like it.
Meets Agency's Needs:	<i>Presenter: tailor this section to your agency's mission, goals, etc.</i>
Training/ Developmental Assignments:	Assist someone else in your office so you can prepare for that type of position, when it opens up; propose and put in place new ways to do the work you've been doing; take a class in accounting; "shadow" someone in an accounting office to see if you like the work.

- B. Facilitate a discussion with participants as they reconvene and share solutions.

IX. Begin Drafting an IDP

- A. Presenter distributes blank IDP forms and asks participants to begin drafting their own IDP. *Instruct participants to use the information they learned about themselves in the earlier session, "Workplace Skills and Career Development," as well as the information from this workshop.*
- B. Presenter provides individual assistance to participants as needed. Additional presenters may be useful for individual assistance at this point in the workshop.

X. Questions and Answers

- A. Ask the group the following questions and encourage discussion:
- What problems do you foresee with completing your IDP?
 - What else do you need to be able to complete it?
- B. Encourage individual follow-up.

U.S. Department of Labor

Individual Development Plan Manual

PREPARING AN IDP

An IDP is:

- A document used to indicate training and developmental needs and to identify possible training solutions.
- An *action plan* which focuses on immediate and short-term goals that are in line with the longer-term goals of the employee and the organization.
- A joint effort between the employee and the manager. IDP preparation involves feedback and discussions about developmental needs, goals, and plans.
- A tool to identify and plan for training and experience which develop the knowledge, skills, and abilities necessary to meet the goals of the employee and the organization.

An IDP is not:

- A long-range development plan. Long-range goals drive shorter-term objectives, but the IDP is an action plan which focuses on the present position and short-range goals.
- A performance appraisal. The IDP does not replace a performance appraisal (strengths and weaknesses are being considered, but the employee is not being rated).
- A Performance Improvement Plan (PIP). Supervisors use PIPs to give underperforming employees who have been rated at less than fully successful on a critical element the opportunity to improve their performance. IDPs do not directly address performance *problems* or the corrective actions taken for those problems.
- A contract between employee and supervisor. The IDP is not a guarantee for payment of training.
- A way to clarify or revise a position description. The personnel office and the supervisor need to review this issue, if necessary.
- A promise for promotion upon completion of training objectives. The IDP does not guarantee advancement, but does increase the employee's ability to compete for future jobs as he or she develops skills.
- A method of resolving disputes between the manager and the employee.

Goals of the IDP

Learn new skills to improve current job performance.

Maximize current performance which will help the organization meet its goals.

Increase interest, satisfaction, and challenge in current position.

Obtain knowledge, skills, and abilities necessary to reach career goals that are in line with organizational goals.

The IDP Should Include the Following:

Clearly defined developmental goals;

The knowledge, skills, and abilities that must be developed in order to achieve these goals;

Specific assignments, training courses, projects, and other developmental activities; and

Proposed completion dates or time frames for the activities listed.

ROLE OF THE EMPLOYEE, THE SUPERVISOR, AND THE CAREER ASSISTANCE COUNSELOR

Role of the Employee:

Assess the knowledge, skills and abilities he/she needs to develop to perform the job.

Find potential learning opportunities that will help the employee meet the job's requirements.

Discuss the IDP with the supervisor.

Work with a career counselor for help in the drafting of the IDP and to prepare for a discussion with the supervisor.

Once the employee has reached a competency level in his/her current job, he/she should begin to develop objectives for higher level work.

Role of Supervisor:

Identify the knowledge, skills and abilities the employee will need to do the job.

Initiate the IDP process.

Offer constructive feedback about developmental strengths and weaknesses.

Act as a coach regarding possible developmental activities to achieve the objectives and goals defined in the IDP.

Define reasonable limits given organizational requirements and priorities, objectives, and needs of other employees.

Role of the Career Counselor:

Assist the employee in identifying strengths and areas needing improvement.

Advise the supervisor and/or the employee in the IDP process.

Assist both the supervisor and the employee with researching appropriate training and development opportunities.

Guide the employee in drafting the IDP .

Assist the employee in setting career goals once competency on the current job has been reached.

IMPORTANT POINTS TO REMEMBER

WHEN PREPARING AN IDP

The employee's goals should be realistic.

A career counselor can provide excellent assistance in the preparation of an IDP. The counselor can help the employee identify knowledge, skills and abilities needed to reach goals, as well as developmental activities to develop those knowledge, skills, and abilities.

Training goals should be consistent with, and supportive of organizational goals.

The IDP is not a binding document. When the supervisor signs the IDP, it is simply an indication of his or her support for the employee's training and development. The employee may not always be able to take advantage of training because of budgetary or workload constraints.

QUESTIONS EMPLOYEES CAN CONSIDER
WHEN BEGINNING TO DRAFT AN IDP

- a) What knowledge, skills, and abilities will be necessary to do your work?

- b) Keeping in mind your self-assessment and the requirements of your position, what knowledge, skills, and abilities *do you need to develop*?

- c) What kinds of training/experiences would help you develop the knowledge, skills, and abilities?

- d) Once you've developed competency in your current job, you can start to think about your longer-term career goals. What are your long-term career goals?

- e) Are these goals realistic?

- f) What knowledge, skills, and abilities will you need to develop to reach those goals?

- g) What kinds of training/experiences would help you develop the knowledge, skills, and abilities?

COMMONLY ASKED QUESTIONS ABOUT IDPs

1. Q: How is the IDP drafted?

A: The IDP is drafted by the employee and the supervisor and, if desired, the career counselor. The IDP should specify in detail the developmental goals and technical skills needed for the present job and/or future positions and helping the employee identify appropriate training and/or developmental activities.

2. Q: Who signs the IDP?

A: The supervisor, employee, and counselor sign and date the IDP. It is then forwarded to the training officer for review and signature.

3. Q: How is the IDP implemented?

A: The IDP is implemented when the employee initiates and completes the activities listed. The employee may need to complete form 101 and submit it to the supervisor to arrange for formal training. The employee should indicate on the IDP when other developmental goals are met. The IDP should be reviewed regularly by both the supervisor and employee to ensure targeted dates are being met.

4. Q: Once the IDP is developed, can I change it?

A: Absolutely. Unexpected situations can make some planned training impossible, and new job demands can require additional training.

STEPS IN THE IDP PROCESS

STEP 1: ASSESSMENT

- A. The *supervisor initiates the IDP process* by evaluating the skills needed for the current job and the employee's background, noting areas of strength and areas possibly needing improvement.
- B. The *employee reviews* his/her prior job experience, training and education and compares his/her current skills to those needed for the job. These "skill gaps" form the basis of the employee's developmental objectives.
- C. The *supervisor and employee develop a recommended plan of action* by researching training and developmental activities needed to reach the employee's objectives. A career counselor can assist in identifying training resources and in deciding on the most appropriate course of action.
- D. Once steps A through C are completed, the employee can repeat the process to identify objectives for future assignments.

OUTCOME: Working drafts of an IDP which include developmental needs and possible training or developmental solutions.

STEP 2: EMPLOYEE/SUPERVISOR MEETING

- A. The *supervisor arranges a meeting with the employee*. In this meeting, both the supervisor and employee discuss the employee's needs in the context of his or her job requirements. A career counselor is available to help either the employee or the supervisor prepare for the meeting.
- B. The *supervisor coaches the employee* with appropriate information regarding challenging assignments, career paths within the organization, the unit's "mission" from the supervisor's perspective, and a reasonable time frame in which to accomplish the objectives set forth in the draft.

OUTCOME: To reach a mutual commitment between the supervisor and the employee regarding the IDP plan.

STEP 3: EMPLOYEE COMPLETES FINAL IDP PLAN FOR SIGNATURES

- A. The *employee makes corrections or additions and prepares the final IDP* for the supervisor's approval. If the final copy is acceptable to the supervisor, the supervisor signs the IDP form indicating support of the plan. Then, the employee submits the final IDP plan to the career counselor for signature.

OUTCOME: To establish a written career development plan.

STEP 4: IDP IMPLEMENTATION

- A. The employee begins training and working on developmental assignments. If necessary, the employee completes the appropriate training forms and submits them to the training officer for review and approval. The employee informs the supervisor of any problems he or she is having with following through.

OUTCOME: To follow through on an IDP commitment.

STEP 5: FOLLOW-UP AND REVIEW

- A. The employee should meet with his or her supervisor every six months to determine if the IDP is meeting the developmental needs of the employee and the organization.

OUTCOME: To systematically continue and support a career development plan for the employee.

TYPES OF TRAINING AND DEVELOPMENTAL ACTIVITIES

Sources of Informal Training

On-the-Job Training (OJT)

A planned process where an employee is given progressive and developmental work assignments in an effort to achieve specific learning objectives. The supervisor planning OJT should make the learning objectives as specific as possible and clearly map out the method by which the training should take place (for example, who will do the teaching, what skills and information will be taught, in what order will the information be presented).

Details or Rotational Assignments

A temporary assignment to another work area to fill a manpower shortage, help meet a production deadline, teach or learn a new skill, or gain experience in another job.

Self-study

Independent reading, research, or training courses. Sources for self-study training include the Career Assistance Center, Resource Exchange, the Internet, and local public libraries.

Special Projects

Usually short-term work assignments given to an employee in addition to his or her regular duties. Examples of special projects can include researching articles, conducting a special investigation, writing a book review or report, leading meetings, creating and installing a new system, orienting new employees to their work place, planning an off-site meeting, and joining an ad hoc committee.

Attendance at Conferences and Seminars

Activities that can help employees meet experts in their field, learn about new research, and obtain resource materials.

Membership in Professional or Networking Organizations

These include associations by industry or areas of expertise, such as the Society of Government Economists, Professional Managers Association, or other professional groups such as Federally Employed Women and Toastmasters.

Sources of Formal Training

DOL Internal

Provided by the Training and Development department in the Human Resources Center.

Government Interagency

Training provided by an interagency training activity, or by a Federal department, agency, or independent establishment other than the one in which a trainee is currently employed.

Non-government

Training developed and delivered by an independent organization or individual to meet the needs of a wide range of employees. These organizations can include independent consultants, professional associations, colleges or universities, or other commercial or industrial organizations.

Individual Development Plan

U.S. Department of Labor

Employee Name (Last, first and initial) Downs, Terry		Agency OSHA	GS Grade GS-303-01
Office Address and Phone No. Rm. N-5555		Present Position Clerk	Date Assigned Present Position 6/15/97

Development Goals	Needed Skills	Recommended Plan of Action	
State development goals as clearly as possible.	State the skills, knowledges and abilities to be developed.	State the type of assignment or training recommended (developmental assignments, seminars). Specify resource and location.	State the proposed completion date.
1. Improve accuracy and speed in sorting and distributing mail.	1. Knowledge of organization and its functions.	1a. Read office mission and function statements, as well as office procedures manual. 1b. Review office structure with job coach. 1c. Interview employees to whom mail will be delivered and create "cheat sheet" regarding commonly received items and their distribution.	1a. July 15, 1997 1b. July 15, 1997 1c. July 30, 1997
2. Discuss discrepancies in documents and forms with coworkers.	2. Skill in communicating orally.	2a. "Basic Communication Skills" USDA Graduate School 2b. "Speaking with Confidence" USDA Graduate School	2a. August 9 - 13, 1997 2b. September 13 - 15, 1997
3. Take on duties of producing and correcting mailing labels.	3. Skill in using basic functions of WordPerfect including merge functions.	3a. Individual on-the-job training sessions with job coach and clerk typist. 3b. Serve as back-up to clerk typist on duties related to label creation and correction.	3a. August 30, 1997 3b. September - December 1997

I am currently working on my A.A. degree in business administration.

Comments of Supervisor (Optional):

Comments of Counselor:

Met with employee and supervisor 7/13/97. They will hold quarterly discussions regarding IDP progress.

Typed Name and Signature of Employee Date

Typed Name and Signature of Employee Date

Typed Name and Signature of Employee Date

Individual Development Plan Workshop

Case Studies

Case 1

You have had 2 positions in the past 5 years as a clerk. Your supervisors have reported that you are dedicated, hard working and dependable. You are good at spotting errors, but have a hard time letting your coworkers know when they make them. You usually try to say something, but you just can't seem to get the words to sound right.

Case 2

You have been in the clerk position for six months. You have worked hard and have been reliable. Your goal is to move into a more responsible position. Your supervisor believes you need to develop oral communication skills and become more of a team-player, but she also wants to encourage your interest in the office automation field.

Case 3

You have been in the clerk position for several weeks. Your supervisor has noted that you have outstanding secretarial skills and you finish your work quickly. Your supervisor would like to help you move up, although there is no opening for which you would be eligible at this time. You have always had an interest in accounting, but have never taken any classes in it.

CASE STUDY WORKSHEET

Directions: Please discuss your assigned case with each group member and have one group member record your responses to the following items on this handout.

Define several developmental goals for this employee.

Example: To obtain formal training in interpersonal skills.

1. _____
2. _____
3. _____

Describe how these developmental goals meet the agency's mission and goals.

Example: Relates to the agency's need to provide excellent customer service.

1. _____
2. _____
3. _____

List a variety of training solutions and developmental assignments that are appropriate to the case.

Example: Take a course on customer service through USDA.

1. _____
2. _____
3. _____